

**SEARCH REQUEST FORM**

Scientific and Technical Information Center

Requester's Full Name: YOGESH C. GARG Examiner #: 78595 Date: 02/24/03  
 Art Unit: 3625 Phone Number 306 0252 Serial Number: 09/929735  
 Mail Box and Bldg/Room Location: PK 5 7405 Results Format Preferred (circle): PAPER DISK E-MAIL

If more than one search is submitted, please prioritize searches in order of need.

\*\*\*\*\*  
 Please provide a detailed statement of the search topic, and describe as specifically as possible the subject matter to be searched. Include the elected species or structures, keywords, synonyms, acronyms, and registry numbers, and combine with the concept or utility of the invention. Define any terms that may have a special meaning. Give examples or relevant citations, authors, etc. if known. Please attach a copy of the cover sheet, pertinent claims, and abstract.

Title of Invention: Communication Interface for a financial modeling and counseling system  
 Inventors (please provide full names): See Attached PG-Pub.

Earliest Priority Filing Date: See Bibliography Sheet Attached. Class 705/136  
CON. OF 11/01/2000 CIP - 11/01/1999 Int'l Class G 06F 19/60  
 \*For Sequence Searches Only\* Please include all pertinent information (parent, child, divisional, or issued patent numbers) along with the appropriate serial number.

KEY WORDS: (Financial modeling), (Financial Counseling System), (Like Advisor or Consultant or experts), (user interface) - (Communication options), (email, video, video-clips, audio, chat or talk, voice, telephone) (collaborative medium for sharing data between user and advisor).

Copy of claims enclosed.  
 Copy of Drawings & Abstract enclosed.

**STAFF USE ONLY**

	Type of Search	Vendors and cost where applicable
Searcher: <u>Pragati</u>	NA Sequence (#) _____	STN <input checked="" type="checkbox"/> _____
Searcher Phone #: <u>305-5714</u>	AA Sequence (#) _____	Dialog <u>\$ 757.00</u>
Searcher Location: <u>ELC 3600</u>	Structure (#) _____	Questel/Orbit _____
Date Searcher Picked Up: <u>2-25-2003</u>	Bibliographic <input checked="" type="checkbox"/> _____	Dr.Link _____
Date Completed: <u>3-26-2003</u>	Litigation _____	Lexis/Nexis _____
Searcher Prep & Review Time: <u>60</u>	Fulltext _____	Sequence Systems _____
Clerical Prep Time: _____	Patent Family _____	WWW/Internet <input checked="" type="checkbox"/> _____
Online Time: <u>162</u>	Other _____	Other (specify) _____

Search Report from Ginger D. Roberts

?show files;ds

File 20:Dialog Global Reporter 1997-2003/Feb 26

(c) 2003 The Dialog Corp.

File 47:Gale Group Magazine DB(TM) 1959-2003/Feb 25

(c) 2003 The Gale group

File 148:Gale Group Trade & Industry DB 1976-2003/Feb 25

(c)2003 The Gale Group

File 275:Gale Group Computer DB(TM) 1983-2003/Feb 25

(c) 2003 The Gale Group

File 609:Bridge World Markets 2000-2001/Oct 01

(c) 2001 Bridge

File 654:US PAT.FULL. 1976-2003/Feb 25

(c) FORMAT ONLY 2003 THE DIALOG CORP.

Set	Items	Description
S1	10	(WEB OR INTERNET? OR CYBERSPACE) (2W) COLLABORATION(S) (GUI OR INTERFACE? OR BROWSER?) (S) (COMMUNICATION? ? (2N) (OPTION? ? OR CHOICE? ? OR SELECT?))
S2	8	RD (unique items)

?t2/3,k/all

2/3,K/1 (Item 1 from file: 20)

DIALOG(R)File 20:Dialog Global Reporter

(c) 2003 The Dialog Corp. All rts. reserv.

23939310 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**BuildLinks Releases Version 3.0 to Rapidly Growing Customer Base; Reports and Options Selection Features are Dramatically Enhanced**

BUSINESS WIRE

July 17, 2002

JOURNAL CODE: WBWE LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 558

... to make the building process dramatically more manageable. Accessible anytime and anywhere through a Web browser, BuildLinks manages and documents threaded discussions while coordinating building specifications, options selection, approval deadlines and...

2/3,K/2 (Item 1 from file: 47)

DIALOG(R)File 47:Gale Group Magazine DB(TM)

(c) 2003 The Gale group. All rts. reserv.

05058039 SUPPLIER NUMBER: 20158338 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Taking virtual office public. (Netopia's Netopia Virtual Office 2.0, Internet-based collaboration tool) (Software Review) (Evaluation)**

Kramer, Matt

PC Week; v15, n2, p66(1)

Jan 12, 1998

DOCUMENT TYPE: Evaluation ISSN: 0740-1604

LANGUAGE: English

RECORD TYPE: Fulltext; Abstract

WORD COUNT: 718 LINE COUNT: 00060

**ABSTRACT:** Netopia's \$50 Netopia Virtual Office 2.0 is an Internet-based collaboration tool that allows users to host virtual offices on the GeoCity Web site as well...

...to run constantly. Unfortunately, the application's security features are rather limited, as are its communications options. Conferencing features on Netopia also need improvement, with a test-based chat interface that is unable to retain a transcript of a session. The software does have powerful...

Search Report from Ginger D. Roberts

2/3,K/3 (Item 1 from file: 609)  
DIALOG(R)File 609:Bridge World Markets  
(c) 2001 Bridge. All rts. reserv.

01396048 BPMVBQR (USE FORMAT 7 FOR FULLTEXT)  
**FULL: First Virtual to offer Click to Meet tech to HighwayOne (B)**  
BRIDGENEWS GLOBAL MARKETS  
Tuesday, February 20, 2001 18:49 GMT  
JOURNAL CODE: MAR LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT  
DOCUMENT TYPE: NEWSWIRE  
WORD COUNT: 1,179

...THAT HIGHWAYONE, A LEADING BROADBAND  
SERVICE PROVIDER IN GERMANY, FRANCE, AND THE UNITED KINGDOM, HAS **SELECTED**  
FIRST VIRTUAL **COMMUNICATIONS** CORE TECHNOLOGY, CLICK TO MEET(TM), FOR  
DEPLOYMENT OF A BROADBAND RICH MEDIA SERVICE TO...

...THEIR DESKTOP COMPUTERS AND ROOM SYSTEMS. USING  
CLICK TO MEET'S SIMPLE POINT AND CLICK **INTERFACE**, HIGHWAYONE CUSTOMERS  
WILL BE  
ABLE TO SIMULTANEOUSLY ACCESS TWO-WAY VIDEO, STREAMING, AND **WEB**  
**COLLABORATION**  
APPLICATIONS.

Click to Meet is an integrated rich media communications solution that  
includes a range...

2/3,K/4 (Item 2 from file: 609)  
DIALOG(R)File 609:Bridge World Markets  
(c) 2001 Bridge. All rts. reserv.

00933587 BKRFCBQ (USE FORMAT 7 FOR FULLTEXT)  
**FULL: Evoke to provide online svcs/Webconferencing to eAttorney (B)**  
BRIDGENEWS GLOBAL MARKETS  
Thursday, September 21, 2000 13:07 GMT  
JOURNAL CODE: MAR LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT  
DOCUMENT TYPE: NEWSWIRE  
WORD COUNT: 1,064

...APPLICATION SERVICE PROVIDER (ASP) AND DESTINATION  
SITE FOR THE LEGAL COMMUNITY, HAVE PARTNERED TO OFFER **WEB COLLABORATION**  
TOOLS  
FOR ATTORNEYS AND THEIR CLIENTS THROUGH HTTP://WWW.EATTORNEY.COM. THROUGH  
THIS AGREEMENT, EVOKE...

...TIME SPENT BETWEEN  
THE INITIAL SALES CALL AND THE CLOSING OF THE SALE.  
"We have **selected** Evoke **Communications** ' time-saving and reliable  
service  
to provide a clear definition of messages conveyed during legal...

...allows sharing and exchange of real-time audio through  
an easy-to-use, Web-based **interface**.  
"This partnership will enable thousands of law professionals to take  
advantage of our automated Webconferencing...

2/3,K/5 (Item 1 from file: 654)  
DIALOG(R)File 654:US PAT.FULL.  
(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

February 26, 2003 2 10:30

# Search Report from Ginger D. Roberts

4824589 \*\*IMAGE Available

## Utility

### Dynamic customer profile management

Inventor: Guheen, Michael F., Tiburon, CA  
 Mitchell, James D., Manhattan Beach, CA  
 Barrese, James J., San Jose, CA  
 Assignee: Accenture LLP (02), Chicago, IL  
 Examiner: Gravini, Stephen (Art Unit: 362)  
 Law Firm: Merchant & Gould P.C.

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6519571	A	20030211	US 99321273	19990527
Priority				US 99321273	19990527

Fulltext Word Count: 138820

## Description of the Invention:

...the target system. This can range from simple components offering limited functionality (worksheet or charting GUI components), to components handling a significant portion of the application architecture (data access components and...are supported by computer systems, system test is changing in nature. Firstly, the testing of interfaces to other systems is becoming an ever larger part of systems test. Secondly, system test...

2/3,K/6 (Item 2 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

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4804929 \*\*IMAGE Available

## Utility

### System, method, and article of manufacture for a polymorphic exception handler in environment services patterns

Inventor: Bowman-Amuah, Michel K., Colorado Springs, CO  
 Assignee: Accenture LLP (02), Palo Alto, CA  
 Examiner: Wright, Norman M. (Art Unit: 211)  
 Law Firm: Oppenheimer Wolff & Donnelly LLP

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6502213	A	20021231	US 99386432	19990831
Priority				US 99386432	19990831

Fulltext Word Count: 143260

## Description of the Invention:

...do not provide specific services for graphical navigation, but the effect can be recreated by selecting (i.e., clicking on) graphical controls, such as picture controls or iconic push-buttons, programmed...

2/3,K/7 (Item 3 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

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February 26, 2003 3 10:30

Search Report from Ginger D. Roberts

4739060 \*\*IMAGE Available  
Derwent Accession: 2002-705422

**Utility**

**E/ System, method and article of manufacture for a persistent state and persistent object separator in an information services patterns environment**

Inventor: Bowman-Amuah, Michel K., Colorado Springs, CO

Assignee: Accenture LLP (02), Palo Alto, CA  
Accenture LLP

Examiner: Dam, Tuan Q. (Art Unit: 212)

Assistant Examiner: Chavis, John

Combined Principal Attorneys: Burton, Daphne L. Oppenheimer Wolff & Donnelly  
LLP

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6442748	A	20020827	US 99388911	19990831
Priority				US 99388911	19990831

Fulltext Word Count: 144063

**Description of the Invention:**

...existing computing resources. Until recently, HTML has been the dominant technology used in development of **Web**-based solutions. However, HTML has proven to be inadequate in the following areas... virtual resource services provide the message formatting and display functionality that allows network nodes to **interface** with wireless paging systems. This service emulates the capabilities of one-way and two-way...

2/3,K/8 (Item 4 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

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4515989 \*\*IMAGE Available  
Derwent Accession: 1999-357686

**Utility**

**E/ Reverse link for a satellite communication network**

Inventor: Reichman, Arie, Kfar Saba, IL

Laufer, Shaul, Tel Aviv, IL

Barda, Avi, Hod Hasharon, IL

Goldenberg, Sorin, Jerusalem, IL

Assignee: Shiron Satellite Communications (1996) Ltd. (03), Petach Tikva,  
IL

Shiron Satellite Communications 1996 Ltd IL

Examiner: Vu, Huy D. (Art Unit: 263)

Law Firm: Darby & Darby

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6240073	A	20010529	US 97970922	19971114
Priority				US 97970922	19971114

Fulltext Word Count: 14630

**Description of the Invention:**

...delivery, audio applications such as Internet phone, commercial web sites, Internet gaming, local ISPs and **Internet** meeting and **collaboration** software. A further advantage is that bottlenecks that occur in reverse link connections composed of...phone applications. Also

February 26, 2003 4 10:30

Search Report from Ginger D. Roberts

included in the first type of message is data derived from web **browsers** which typically have low duty cycle bursty type messages on one leg and acknowledge messages...For Satellite Packet Switching and Terrestrial Packet Radio Networks," M. B. Pursley, IEEE Journal on **Selected Areas** in **Communications** , Vol. 8, No. 4, May 1990...

?

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?show files;ds

File 20:Dialog Global Reporter 1997-2003/Feb 26  
 (c) 2003 The Dialog Corp.  
 File 141:Readers Guide 1983-2003/Jan  
 (c) 2003 The HW Wilson Co  
 File 148:Gale Group Trade & Industry DB 1976-2003/Feb 25  
 (c)2003 The Gale Group  
 File 349:PCT FULLTEXT 1979-2002/UB=20030220,UT=20030213  
 (c) 2003 WIPO/Univentio  
 File 545:Investext(R) 1982-2003/Feb 26  
 (c) 2003 Thomson Financial Networks  
 File 553:Wilson Bus. Abs. FullText 1982-2003/Jan  
 (c) 2003 The HW Wilson Co  
 File 606:Africa News 1999-2003/Feb 26  
 (c) 2003 Africa News Service Via Comtex  
 File 613:PR Newswire 1999-2003/Feb 26  
 (c) 2003 PR Newswire Association Inc  
 File 636:Gale Group Newsletter DB(TM) 1987-2003/Feb 25  
 (c) 2003 The Gale Group  
 File 649:Gale Group Newswire ASAP(TM) 2003/Feb 25  
 (c) 2003 The Gale Group  
 File 654:US PAT.FULL. 1976-2003/Feb 25  
 (c) FORMAT ONLY 2003 THE DIALOG CORP.  
 File 810:Business Wire 1986-1999/Feb 28  
 (c) 1999 Business Wire  
 File 813:PR Newswire 1987-1999/Apr 30  
 (c) 1999 PR Newswire Association Inc  
 File 993:NewsRoom 2002/Jan-Sep  
 (c) 2003 The Dialog Corporation

Set	Items	Description
S1	37	(COLLABORAT? OR CONFERENC?) (3N) (INTERNET? OR WEB? OR CYBER-SPACE) (S) (OPTION? ? OR CHOOSE OR CHOICE OR SELECT) (3N) (VIDEO? OR EMAIL? OR E()MAIL? OR AUDIO? OR LIVE OR TELEPHONE) (5N) (BROWSER? OR GUI?? OR INTERFACE?)
S2	27	RD (unique items)

?t2/3,k/all

**2/3,K/1 (Item 1 from file: 20)**  
 DIALOG(R)File 20:Dialog Global Reporter  
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23469349

**Canada NewsWire summary of releases for Wednesday, June 19, 2002**  
 CANADA NEWSWIRE  
 June 19, 2002  
 JOURNAL CODE: WCNW LANGUAGE: English RECORD TYPE: FULLTEXT  
 WORD COUNT: 3920

...Inc. Comments on Share Price Increase (a- TransForce-share) C8115 -  
 QUEBEC CITY, PQ : DiagnoCure Announces **Webcast** of **Conference** Call  
 (DiagnoCure- **webcast** ) C8118 - TORONTO : Desjardins Group signs on with  
 CertaPay's Person-to- Person (P2P) Payment Network...

**2/3,K/2 (Item 2 from file: 20)**  
 DIALOG(R)File 20:Dialog Global Reporter  
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15977148 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Cebit 2001: Between Technical Progress And Mass Market**  
 AFRICA NEWS SERVICE

February 26, 2003 1 11:11

Search Report from Ginger D. Roberts

April 03, 2001

JOURNAL CODE: FANS    LANGUAGE: English    RECORD TYPE: FULLTEXT  
WORD COUNT: 1812

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... improved web portal-based conferencing system. The version if brought at the show had in- **browser** **video** streaming and click-2 conference **options** . With the new **video** streaming facility featured at its series 7 platform, a connected camera can be used for...

2/3,K/3    (Item 3 from file: 20)

DIALOG(R)File 20:Dialog Global Reporter  
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10146757 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**McAfee Software Goes Live With Online Customer Support Using Sento and EchoPass Customer Service Solutions**

PR NEWSWIRE

March 20, 2000

JOURNAL CODE: WPRW    LANGUAGE: English    RECORD TYPE: FULLTEXT  
WORD COUNT: 691

... that they receive over the telephone through the Internet. Online customers have a choice between **Web** text chat, **browser** **collaboration** , immediate **e - mail** replies, Web call backs, or the traditional **telephone** for support. Offering customers the **choice** of multiple channels of communication, either through the **telephone** or Internet, enhances the customer experience with true, value-added support. The new technical support...

2/3,K/4    (Item 4 from file: 20)

DIALOG(R)File 20:Dialog Global Reporter  
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02886711

**White Pine Launches Meeting Point 3.5, the Next Generation of Its Software-Based, H.323 Videoconferencing Server**

BUSINESS WIRE

September 22, 1998

JOURNAL CODE: WBWE    LANGUAGE: English    RECORD TYPE: FULLTEXT  
WORD COUNT: 1018

... background noise and when someone is actually speaking during a group conference. Through a web **browser** , the user has the **option** of selecting whose **video** is displayed on the screen, enabling the user to override traditional voice- activated conference switching...

... well as White Pine's own CU-SeeMe. Conference Administration MeetingPoint 3.5 has new **web** -based **conference** administration features in bandwidth management, network management, and security, all done via a web- browser...

2/3,K/5    (Item 5 from file: 20)

DIALOG(R)File 20:Dialog Global Reporter  
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02870461 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**IBM: Lotus introduces new version of Instant!TEAMROOM**



Search Report from Ginger D. Roberts

M2 PRESSWIRE

September 18, 1998

JOURNAL CODE: WMPR LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 926

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... built-in e-mail notification option, distributed editing, and enhanced status tracking offer simple, powerful **web collaboration** for teams

Lotus Development Corp. today announced the availability of Instant!TEAMROOM 1.5, the...

... distributed document editing and enhanced status tracking, making it easier than ever for teams to **collaborate** over the **Web**. Instant!TEAMROOM 1.5 is available now through Lotus 'Net Service Provider, Alliance Partners ('NSPAPs...

2/3,K/6 (Item 6 from file: 20)

DIALOG(R)File 20:Dialog Global Reporter

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02841271

Lotus Introduces New Version of Instant!TEAMROOM

PR NEWSWIRE

September 17, 1998

JOURNAL CODE: WPRW LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 1029

... Built-in E-mail Notification Option, Distributed Editing and Enhanced Status Tracking Offer Simple, Powerful **Web Collaboration** for Teams CAMBRIDGE, Mass., Sept. 17 /PRNewswire/ -- Lotus Development Corp. today announced the availability of...

... related documents and track progress from start to finish. Instant!TEAMROOM 1.5 features an **e - mail notification option**, an enhanced user **interface** and new billing and administrative options. The new release also offers distributed document editing and enhanced status tracking, making it easier than ever for teams to **collaborate** over the **Web**. Instant!TEAMROOM 1.5 is available now through Lotus 'Net Service Provider, Alliance Partners ('NSPAPs...

... to provide organizations with easy and convenient access to a wide variety of solutions for **collaborating** on the **Web**. "Instant!TEAMROOM has brought an exceptionally easy-to-use and hassle-free application within reach...

... lead a market that has begun to get some significant traction over the past year." **E - mail Notification, Enhanced User Interface, Flexible Payment Options** Designed to enliven the user's experience, enhance usability and broaden team involvement, Instant!TEAMROOM...

2/3,K/7 (Item 1 from file: 141)

DIALOG(R)File 141:Readers Guide

(c) 2003 The HW Wilson Co. All rts. reserv.

04285721 H.W. WILSON RECORD NUMBER: BRGA00035721

Houston, we have the agenda.

Fortune special issue (Summer 2000) p. 95-8

ABSTRACT: Part of a special issue presenting Fortune's summer 2000

February 26, 2003 3 11:11

Search Report from Ginger D. Roberts

technology **guide** . In the area of **videoconferencing** , the Internet offers better, more varied, and more affordable **options** than before. Although **video** feeds require so much data that people with dial-up Internet access cannot expect to...

...for users with DSL, cable modems, T1 lines, and other high bandwidth connections. Developments in **Web conferencing** are discussed, and a table lists **Web conferencing** software and services and hardware.

2/3,K/8 (Item 1 from file: 349)  
DIALOG(R) File 349:PCT FULLTEXT  
(c) 2003 WIPO/Univentio. All rts. reserv.

00784185 \*\*Image available\*\*

A SYSTEM AND METHOD FOR STREAM-BASED COMMUNICATION IN A COMMUNICATION SERVICES PATTERNS ENVIRONMENT  
SYSTEME, PROCEDE ET ARTICLE DE PRODUCTION FOURNISSANT UN SYSTEME DE COMMUNICATION EN CONTINU DANS UN ENVIRONNEMENT DE CONFIGURATIONS DE SERVICES DE COMMUNICATION

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

BOWMAN-AMUAH Michel K, 6426 Peak Vista Circle, Colorado Springs, CO 80918  
, US,

Legal Representative:

HICKMAN Paul L (agent), Hickman Coleman & Hughes, LLP, P.O. Box 52037,  
Palo Alto, CA 94303-0746, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200117195 A2-A3 20010308 (WO 0117195)

Application: WO 2000US24125 20000831 (PCT/WO US0024125)

Priority Application: US 99386717 19990831

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CR CU CZ  
DE DK DM DZ EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP KR KZ

LC LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG  
SI SK SL TJ TM TR TT TZ UA UG UZ VN YU ZA ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 150532

Fulltext Availability:

Detailed Description

Detailed Description

... dynamic pages that support rich graphic images and virtual reality. So what next for the **Web** ? The answer resides in a Synchronized Multimedia Integration Language (SMEL), a new markup language being...

...installed browser market and strong developer support. Communicator is the newest version with add-on **collaborative** functionality

Microsoft **Internet Explorer** (IE) - a Web Browser that is tightly integrated with Windows and supports the major...g., data, voice, video) have different quality of service requirements. For example, data associated with **video** conferencing sessions is useless if it is not

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delivered "on time". On the other hand, traditional best-effort data

Search Report from Ginger D. Roberts

services, such as file or e-mail transfer, are not affected by variations in latency. QoS (Quality of Service) services deliver a...

2/3,K/9 (Item 2 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00784135

A SYSTEM, METHOD AND ARTICLE OF MANUFACTURE FOR A LOCALLY ADDRESSABLE  
INTERFACE IN A COMMUNICATION SERVICES PATTERNS ENVIRONMENT  
SYSTEME, PROCEDE ET ARTICLE DE PRODUCTION METTANT EN OEUVRE UNE INTERFACE  
ADRESSABLE LOCALEMENT DANS UN ENVIRONNEMENT DE CONFIGURATIONS DE  
SERVICES DE COMMUNICATION

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

BOWMAN-AMUAH Michel K, 6426 Peak Vista Circle, Colorado Springs, CO 80918  
, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly, LLP, 38th Floor,  
2029 Century Park East, Los Angeles, CA 09967-3024, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200116727 A2-A3 20010308 (WO 0116727)  
Application: WO 2000US24189 20000831 (PCT/WO US0024189)

Priority Application: US 99387064 19990831

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES  
FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD

MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ  
VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 151048

Fulltext Availability:

Detailed Description

Detailed Description

... Bootstrap Protocol)

Quality of Service 2414

Different types of network traffic (e.g., data, voice, video) have different quality of service requirements. For example, data associated with video conferencing sessions is...in the market place and the ease of accessing and down loading components from the Internet ; the decision to buy or build a component is as real as ever. In general...

2/3,K/10 (Item 3 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
(c) 2003 WIPO/Univentio. All rts. reserv.

00784132

A SYSTEM, METHOD AND ARTICLE OF MANUFACTURE FOR A LEGACY WRAPPER IN A  
COMMUNICATION SERVICES PATTERNS ENVIRONMENT  
SYSTEME, PROCEDE ET DISPOSITIF POUR MODULE D'HABILLAGE EXISTANT DANS UN  
ENVIRONNEMENT DE SCHEMAS DE SERVICES DE COMMUNICATION

Patent Applicant/Assignee:

Search Report from Ginger D. Roberts

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

BOWMAN-AMUAH Michel K, 6426 Peak Vista Circle, Colorado Springs, CO 80918  
, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly, LLP, 1400 Page Mill  
Roadast, Palo Alto, CA 94304, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200116724 A2-A3 20010308 (WO 0116724)  
Application: WO 2000US24084 20000831 (PCT/WO US0024084)  
Priority Application: US 99386834 19990831

Designated States: AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CU CZ DE DK

DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT  
LU LV MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR  
TT UA UG UZ VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 150947

Fulltext Availability:

Detailed Description

Detailed Description

... control policy. A variety of mechanisms exist for protecting private  
networks including.

Filters - World Wide **Web** filters can prevent users from accessing  
specified content or Internet addresses. Products can limit access...etc.

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application proxies

Microsoft Proxy Server - allows for designation of who can access the  
**Internet** and which services they can use. Administrators can establish  
additional credentials for logging on, set...on time". On the other hand,  
traditional best-effort data services, such as file or **e - mail**  
transfer, are not affected by variations in latency. QoS (Quality of  
Service) services deliver a...

2/3,K/11 (Item 4 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00784131

**A SYSTEM, METHOD AND ARTICLE OF MANUFACTURE FOR A MULTI-OBJECT FETCH  
COMPONENT IN AN INFORMATION SERVICES PATTERNS ENVIRONMENT**

**SYSTEME, PROCEDE ET ARTICLE MANUFACTURE POUR COMPOSANT DE RECUPERATION  
MULTI-OBJET DANS UN ENVIRONNEMENT CARACTERISE PAR DES SERVICES  
D'INFORMATIONS**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

BOWMAN-AMUAH Michel K, 6426 Peak Vista Circle, Colorado Springs, CO 80918  
, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly LLP, Suite 3800,

Search Report from Ginger D. Roberts

2029 Century Park East, Los Angeles, CA 90067, US,  
Patent and Priority Information (Country, Number, Date):  
Patent: WO 200116723 A2-A3 20010308 (WO 0116723)  
Application: WO 2000US24083 20000831 (PCT/WO US0024083)  
Priority Application: US 99386238 19990831  
Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CR CU CZ DE DK DM  
EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU  
LV MA MD MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT  
TZ UA UG UZ VN YU ZW  
(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
(EA) AM AZ BY KG KZ MD RU TJ TM  
Publication Language: English  
Filing Language: English  
Fulltext Word Count: 150940

Fulltext Availability:  
Detailed Description

Detailed Description

... message as part of each request because there is no persistent  
connection open between the **Web** client and the Web server.

Digital Certificates or Signatures - encrypted digital keys that are  
issued...on time". On the other hand, traditional best-effort data  
services, such as file or **e-mail** transfer, are not affected by  
variations in latency. QoS (Quality of Service) services deliver a...a  
viable option and should be researched, even including even simple UI  
controls available on the **Internet**. Look at market trends to determine  
which applications/components can meet the bulk of the...

2/3,K/12 (Item 5 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00784126

**SYSTEM, METHOD, AND ARTICLE OF MANUFACTURE FOR AN EXCEPTION RESPONSE TABLE  
IN ENVIRONMENT SERVICES PATTERNS**  
**SYSTEME, PROCEDE ET ARTICLE DE PRODUCTION DESTINES A UNE TABLE DE REPONSE  
D'EXCEPTION DANS DES CONFIGURATIONS DE SERVICES D'ENVIRONNEMENT**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

BOWMAN-AMUAH Michel K, 6426 Peak Vista Circle, Colorado Springs, CO 80918  
, US,

Legal Representative:

HICKMAN Paul L (et al) (agent), Oppenheimer Wolff & Donnelly LLP, 38th  
Floor, 2029 century Park East, Los Angeles, CA 90067-3024, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200116706 A2-A3 20010308 (WO 0116706)  
Application: WO 2000US24086 20000831 (PCT/WO US0024086)  
Priority Application: US 99387873 19990831

Designated States: AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CU CZ DE DK  
DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT  
LU LV MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR  
TT UA UG UZ VN YU ZW  
(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

Search Report from Ginger D. Roberts

(EA) AM AZ BY KG KZ MD RU TJ TM  
Publication Language: English  
Filing Language: English  
Fulltext Word Count: 150318

Fulltext Availability:  
Detailed Description

Detailed Description

... installed browser market and strong developer support. Communicator is the newest version with add-on **collaborative** functionality

Microsoft **Internet** Explorer (IE) - a Web Browser that is tightly integrated with Windows and supports the major...Netscape and OpenMarket are putting plans in place to add EDI transmission capabilities into their **Web** server products. OpenMarket Inc. is working with Sterling and Premenos to integrate their EDI management...and regulatory restrictions. This is a key issue in international e-commerce today.

Possible Product **Options**

Netscape's Secure Sockets Layer (SSL); S-HTTP; **e - mail** encryption; S-MIME

163

Encryption that is architected into Web-based solutions

Netscape's Secure...hardware, system software, database management systems, and communication networks. Examples of items to consider include **E - mail**, database, **GUI** tool, PC applications, other office systems, and business applications.

How scalable is the product?

243...

2/3,K/13 (Item 6 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00784124

**SYSTEM, METHOD, AND ARTICLE OF MANUFACTURE FOR A REQUEST SORTER IN A TRANSACTION SERVICES PATTERNS ENVIRONMENT**  
**SYSTEME, PROCEDE ET ARTICLE DE FABRICATION APPLIQUES DANS UN TRIEUR DE REQUETES D'UN ENVIRONNEMENT DE STRUCTURES DE SERVICES DE TRANSACTIONS**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

BOWMAN-AMUAH Michel K, 6426 Peak Vista Circle, Colorado Springs, CO 80918, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly, LLP, 38th floor, 2029 Century Park East, Los Angeles, CA 90067-3024, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200116704 A2-A3 20010308 (WO 0116704)

Application: WO 2000US24082 20000831 (PCT/WO US0024082)

Priority Application: US 99386715 19990831

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES

FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD

MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ

VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Search Report from Ginger D. Roberts

Publication Language: English  
Filing Language: English  
Fulltext Word Count: 150733

Fulltext Availability:  
Detailed Description

Detailed Description

... ActiveX Technologies, to give developers and Web designers wherewithal to build dynamic content for the **Internet** and personal computers. ActiveX includes tools for developing animation, 3-D virtual reality, video and...continues to mature and its availability increases.

The future: give us a big SMIL

The **Web** has come a long way since the codification of HTML I.O. It has moved...

...installed browser market and strong developer support. Communicator is the newest version with add-on **collaborative** functionality

Microsoft **Internet** Explorer (IE) - a Web Browser that is tightly integrated with Windows and supports the major...separate audio and video streams or by transferring a single interleaved stream. Examples include video **conferencing** and television (traditional or interactive).

Audio/Video services can include the following functionality.

Streams content...Bootl? (Bootstrap Protocol)

Quality ofService 2414

Different types of network traffic (e.g., data, voice, **video**) have different quality of service requirements. For example, data associated with video conferencing sessions is...a viable option and should be researched, even includingeven simple UI controls available on the **Internet**. Look at market trends to detennine which applications/components can meet the bulk of the...

2/3,K/14 (Item 7 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00456834 \*\*Image available\*\*

**A SYSTEM, METHOD AND ARTICLE OF MANUFACTURE FOR SWITCHED TELEPHONY COMMUNICATION**

**SYSTEME PROCEDE ET ARTICLE CONCU POUR LES COMMUNICATIONS TELEPHONIQUES PAR RESEAU COMMUTE**

Patent Applicant/Assignee:

MCI WORLDCOM INC,

Inventor(s):

ZEY David A,

Patent and Priority Information (Country, Number, Date):

Patent: WO 9847298 A2 19981022

Application: WO 98US7927 19980415 (PCT/WO US9807927)

Priority Application: US 97835789 19970415; US 97834320 19970415

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES

FI GB GE GH HU IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD MG MK MN

MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ VN YU ZW

GH GM KE LS MW SD SZ UG ZW AM AZ BY KG KZ MD RU TJ TM AT BE CH CY DE DK

ES FI FR GB GR IE IT LU MC NL PT SE BF BJ CF CG CI CM GA GN ML MR NE SN

TD TG

Publication Language: English

Fulltext Word Count: 156638

Fulltext Availability:

February 26, 2003 9 11:11

Search Report from Ginger D. Roberts

Detailed Description

Detailed Description

... 1 00 that needs management  
and allocation.

0 Specialized Resources 2152 - Special network-based capabilities (Internet to voice conversion, DTMF-detection, Fax, Voice Recognition, etc) are shown as specialized resources 2152...cannot reach you because you are busy or do not answer, is similar to leaving Video Mail. The option to do this is done through the VMDI or communicated with a human video operator.

F, Retrieving Video -Mail and Video On Demand  
Users have the choice of periodically polling their video -mail for new messages, or have the video-mail server call them periodically when they ...

2/3,K/15 (Item 8 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00443927

**A COMMUNICATION SYSTEM ARCHITECTURE**

**ARCHITECTURE D'UN SYSTEME DE COMMUNICATION**

Patent Applicant/Assignee:

MCI WORLDCOM INC,  
EASTEP Guido M,  
LITZENBERGER Paul R,  
OREBAUGH Shannon R,  
ELLIOTT Isaac K,  
STELLE Rick,  
SCHRAGE Bruce,  
BAXTER Craig A,  
ATKINSON Wesley,  
KNOSTMAN Chuck,  
CHEN Bing,  
VANDERSLUIS Kristan,

Inventor(s):

EASTEP Guido M,  
LITZENBERGER Paul R,  
OREBAUGH Shannon R,  
ELLIOTT Isaac K,  
STELLE Rick,  
SCHRAGE Bruce,  
BAXTER Craig A,  
ATKINSON Wesley,  
KNOSTMAN Chuck,  
CHEN Bing,  
VANDERSLUIS Kristan,  
JUN Fang DI,

Patent and Priority Information (Country, Number, Date):

Patent: WO 9834391 A2 19980806

Application: WO 98US1868 19980203 (PCT/WO US9801868)

Priority Application: US 97794555 19970203; US 97794114 19970203; US  
97794689 19970203; US 97807130 19970210; US 97798208 19970210; US  
97795270 19970210; US 97797964 19970210; US 97800243 19970210; US  
97798350 19970210; US 97797445 19970210; US 97797360 19970210

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES  
FI GB GE GH GM GW HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD



Search Report from Ginger D. Roberts

MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG US  
UZ VN YU ZW GH GM KE LS MW SD SZ UG ZW AM AZ BY KG KZ MD RU TJ TM AT BE  
CH DE DK ES FI FR GB GR IE IT LU MC NL PT SE BF BJ CF CG CI CM GA GN ML  
MR NE SN TD TG

Publication Language: English  
Fulltext Word Count: 156226

Fulltext Availability:  
Detailed Description

Detailed Description

... This service termed  
AOn-Line TeleConference@ capability allows teleconference customers to  
use  
an on-line **interface** to allow customers to pre-arrange an AT&T  
TeleConference call through the World Wide...1979. All of these services  
can  
communicate between themselves using the PSTN 1960 and the **Internet**  
1910 via a gateway 1950. The functionality of the ISN 1990 and the DAP  
1972...ISP 2 100 that needs management and  
allocation.

Specialized Resources 2152 - Special network-based capabilities (  
**Internet** to voice conversion, DTMF-detection, Fax, Voice Recognition,  
etc) are shown  
as specialized resources 2152...

2/3,K/16 (Item 1 from file: 545)

DIALOG(R)File 545:Investext(R)

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10508673

**EON COMMUNICATIONS CORP: INITIATING COVERAGE**

NEEDHAM & COMPANY

CHANDLER, D.L.

NEW YORK (STATE OF)

DATE: March 20, 00

INVESTEXT(tm) REPORT NUMBER: 2111683, PAGE 6 OF 22, TEXT/TABLE PAGE

This is a(n) COMPANY report.

TEXT:

...responses and	communicate via	
	leverages unified messaging	medium of
	for response to voice and fax	<b>choice</b> in a
	in a single <b>e - mail interface</b>	seamless way
Integrated Voice	Provides voice mail, fax	* Saves time
Processing	support and unified messaging...	

2/3,K/17 (Item 1 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4804929 \*\*IMAGE Available

Utility

System, method, and article of manufacture for a polymorphic exception  
handler in environment services patterns

Inventor: Bowman-Amuah, Michel K., Colorado Springs, CO

Assignee: Accenture LLP (02), Palo Alto, CA

Search Report from Ginger D. Roberts

Examiner: Wright, Norman M. (Art Unit: 211)  
Law Firm: Oppenheimer Wolff & Donnelly LLP

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6502213	A	20021231	US 99386432	19990831
Priority				US 99386432	19990831

Fulltext Word Count: 143260

Description of the Invention:

...its development as a number of enhancements for extending Web technology come under scrutiny by **Internet** standards groups. These enhancements will ultimately push the Web into the realms of distributed document...

2/3,K/18 (Item 2 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4798845 \*\*IMAGE Available

Derwent Accession: 2001-299839

Utility

Clean-up of orphaned server contexts

Inventor: Bowman-Amuah, Michel K., Colorado Springs, CO

Assignee: Accenture LLP (02), Palo Alto, CA

Examiner: Lim, Krisna (Art Unit: 213)

Law Firm: Oppenheimer Wolff & Donnelly LLP

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6496850	A	20021217	US 99386435	19990831
Priority				US 99386435	19990831

Fulltext Word Count: 147092

Description of the Invention:

...Manipulates real time call activities (e.g., make call, answer, transfer, hold, **conference**, mute transfer, release, route call, call treatments and digits collected...

2/3,K/19 (Item 3 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4680550 \*\*IMAGE Available

Derwent Accession: 2002-517512

Utility

E/ Transacting e-commerce and conducting e-business related to identifying and procuring automotive service and vehicle replacement parts

Inventor: Kolls, H. Brock, 1573 Potter Dr., Pottstown, PA, 19464

Assignee: Unassigned

Unassigned Or Assigned To Individual (Code: 68000)

Examiner: Cuchlinski, Jr., William A. (Art Unit: 361)

Assistant Examiner: Donnelly, Arthur D.

Combined Principal Attorneys: Kolls, H. Brock

# Search Report from Ginger D. Roberts

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6389337	A	20020514	US 2000564471	20000503
CIP	Pending			US 2000556543	20000424
Priority				US 2000564471	20000503
				US 2000556543	20000424

Fulltext Word Count: 35724

## Description of the Invention:

...230. Alternatively, playback can be through the vehicle's radio by way of vehicle radio **interface** 248. In this embodiment an **audio** switch 226 can **select** between playback systems (in-vehicle device 200 or vehicle radio...can be saved. Saving can include saving the user's profile, features, parameters, settings, or **conference** list on an **Internet** based server, or saving the user's profile, features, parameters, settings, or conference list within...

2/3,K/20 (Item 4 from file: 654)  
DIALOG(R)File 654:US PAT.FULL.  
(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4622323 \*\*IMAGE Available  
Derwent Accession: 2002-360156

## Utility

E/ **System and method for providing requested quality of service in a hybrid network**

Inventor: Elliott, Isaac K., Colorado Springs, CO  
Reynolds, Tim E., Iowa City, IA  
Krishnaswamy, Sridhar, Cedar Rapid, IA  
Assignee: MCI Communications Corporation (02), Washington, DC  
MCI Communications Corp (Code: 40955)  
Examiner: Vu, Huy D. (Art Unit: 263)

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6335927	A	20020101	US 96751917	19961118
Priority				US 96751917	19961118

Fulltext Word Count: 125719

## Description of the Invention:

...other network connection. A domain name system 1906 maps names to IP addresses in the **Internet** 1910. Individual systems for billing 1920, provisioning 1922, directory services 1934, messaging services 1930, such ...router (PAR) is designed to combine the features of an internet access device and an **Internet** Protocol (IP) Router. It enables dial-up modem access to the internet by performing essential...Marketable Service Gateway 2128-- **interface** to a three-tier service creation environment for services the provider sells. Services are deployed...shall not be visible to the user of the service feature through the service feature **interfaces**.

2/3,K/21 (Item 5 from file: 654)  
DIALOG(R)File 654:US PAT.FULL.  
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February 26, 2003 13 11:11

Search Report from Ginger D. Roberts

4617785 \*\*IMAGE Available  
Derwent Accession: 2002-254168

**Utility**

**E/ Method for providing communication services over a computer network system**

Inventor: Bowman-Amuah, Michel K., Colorado Springs, CO

Assignee: Accenture, LLP (02), Palo Alto, CA  
Accenture LLP

Examiner: Vu, Viet D. (Art Unit: 214)

Law Firm: Oppenheimer Wolff & Donnelly, LLP

Combined Principal Attorneys: Howell, Stefanie M.

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6332163	A	20011218	US 99387642	19990901
Priority				US 99387642	19990901

Fulltext Word Count: 146694

2/3,K/22 (Item 6 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4547986 \*\*IMAGE Available  
Derwent Accession: 1999-446354

**Utility**

**E/ Network server platform for a hybrid fiber twisted pair local loop network service architecture**

Inventor: Gerszberg, Irwin, Kendall Park, NJ  
Huang, Kenny Xiaojian, Somerset, NJ  
Kwabi, Christopher K., Englewood, NJ  
Roy, Sumit, Scotch Plains, NJ

Assignee: AT&T Corporation (02), New York, NY  
AT&T Corp (Code: 16046)

Examiner: Kizou, Hassan (Art Unit: 262)

Assistant Examiner: Elallam, Ahmed

Law Firm: Banner & Witcoff, Ltd.

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6269101	A	20010731	US 2000511918	20000223
Division	Pending			US 971582	19971231
Priority				US 2000511918	20000223
				US 971582	19971231
Provisional				US 60-70103	19971231
				US 60-70104	19971231
				US 60-70121	19971231

Fulltext Word Count: 17741

**Description of the Invention:**

...6. **VideoPhone** Centrally Controlled User **Interface** With User Selectable **Options** (U.S. application Ser. No. 09/001,576, filed Dec. 31, 1997 of Gerszberg et...example, on audio interface 122, video phone 130, and/or digital phones 121. A digital **telephone** may be connected to the **audio interface** 122 such that a user may **select** any one of a

Search Report from Ginger D. Roberts.

number of digital **audio** service channels by simply having the user push a digital audio service channel button on...application & info-on-demand, support for work-at-home, virtual PBX services, point-and-click **conferencing**, intelligent call management, **Internet** access, and a universal mail box...

2/3,K/23 (Item 7 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4504459 \*\*IMAGE Available

Derwent Accession: 1999-446354

**Utility**

**E/ Network server platform for a hybrid fiber twisted pair local loop network service architecture**

Inventor: Gerszberg, Irwin, Kendall Park, NJ  
Huang, Kenny Xiaojian, Somerset, NJ  
Kwabi, Christopher K., Englewood, NJ  
Roy, Sumit, Scotch Plains, NJ  
Valdez, Gabriel, Jersey City, NJ

Assignee: AT&T CORP (02), New York, NY  
AT&T Corp (Code: 16046)

Examiner: Kizou, Hassan (Art Unit: 278)

Assistant Examiner: Elallam, Ahmed

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6229810	A	20010508	US 971582	19971231
Priority				US 971582	19971231

Fulltext Word Count: 17394

**Description of the Invention:**

...6. **VideoPhone** Centrally Controlled User **Interface** With User Selectable **Options** (U.S. patent application Ser. No. 09/001,908, filed Dec. 31, 1997...example, on audio interface 122, video phone 130, and/or digital phones 121. A digital **telephone** may be connected to the **audio interface** 122 such that a user may **select** any one of a number of digital **audio** service channels by simply having the user push a digital audio service channel button on...applications & info-on-demand, support for work-at-home, virtual PBX services, point-and-click **conferencing**, intelligent call management, **Internet** access, and a universal mail box  
...

2/3,K/24 (Item 8 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4249281 \*\*IMAGE Available

Derwent Accession: 2000-095995

**Utility**

**E/ Method for video telephony over a hybrid network**

Inventor: Krishnaswamy, Sridhar, Cedar Rapids, IA  
Elliott, Isaac K., Colorado Springs, CO  
Reynolds, Tim E., Iowa City, IA  
Forgy, Glen A., Iowa City, IA  
Solbrig, Erin M., Cedar Rapids, IA

Assignee: MCI Communications Corporation (02), Washington, DC  
MCI Communications Corp (Code: 40955)

Search Report from Ginger D. Roberts

Examiner: Chin, Wellington (Art Unit: 273)  
Assistant Examiner: Carman, Melissa Kay

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 5999525	A	19991207	US 96751215	19961118
Priority				US 96751215	19961118

Fulltext Word Count: 128113

Description of the Invention:

...including, name, address, fax number, secretary's number, wife's phone number, pager, business address, e-mail address, IP address and phonemail address. This information is maintained in a database that can ...shows how the ISP architecture 2100 supplies services via different networks. The networks shown include Internet 2160, the public switched telephony network (PSTN) 2162, Metro access rings 2164, and Wireless 2166 ...shall not be visible to the user of the service feature through the service feature interfaces .

...5. Each service feature should have a unified and stable external interface . The interface is described as a set of operations, and the data required and provided by each

2/3,K/25 (Item 9 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4104970 \*\*IMAGE Available

Derwent Accession: 1998-312857

Utility

E/ System, method and article of manufacture for communications utilizing calling, plans in a hybrid network

Inventor: Elliott, Isaac K., Colorado Springs, CO

Krishnaswamy, Sridhar, Cedar Rapids, IA

Assignee: MCI Communications Corporations (02), Washington, DC

MCI Communications Corp (Code: 40955)

Examiner: Chin, Wellington (Art Unit: 273)

Assistant Examiner: Carman, Melissa Kay

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 5867495	A	19990202	US 96758734	19961118
Priority				US 96758734	19961118

Fulltext Word Count: 98158

Description of the Invention:

...A range of high bandwidth services are supported by a preferred embodiment. These include: Video on Demand, Conferencing, Distance Learning, and Telemedicine...

2/3,K/26 (Item 10 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4104969 \*\*IMAGE Available

# Search Report from Ginger D. Roberts

Derwent Accession: 1998-312857

**Utility**  
**E/ System, method and article of manufacture with integrated video conferencing billing in a communication system architecture**

Inventor: Krishnaswamy, Sridhar, Cedar Rapids, IA  
 Elliott, Isaac K., Colorado Springs, CO  
 Reynolds, Tim E., Iowa City, IA

Forgey, Glen A., Iowa City, IA  
 Solbrig, Erin M., Cedar Rapids, IA

Assignee: MCI Communication Corporation (02), Washington, DC  
 MCI Communications Corp (Code: 40955)

Examiner: Chin, Wellington (Art Unit: 273)

Assistant Examiner: Carman, Melissa Kay

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 5867494	A	19990202	US 96752271	19961118
Priority				US 96752271	19961118

Fulltext Word Count: 125798

Description of the Invention:

C. Video **Conference** Call Flow...packets between networks and thus make connections possible. Without these links, data communication through the **Internet** would not be possible, as the information either would not reach its destination or would...physical networks, software is required on each host to allow application programs to use the **Internet** as if it were a single, real physical network...1990, direct-dial plan 1991, provisioning 1974, order entry 1975, billing 1976, directory services 1977, **conferencing** services 1978, and authorization/authentication services 1979. All of these services can communicate between themselves...network implementation shall not be visible to the user of the capability through the capability **interfaces**

2/3,K/27 (Item 1 from file: 993)  
 DIALOG(R) File 993:NewsRoom 2002/Jan-Sep  
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0532036557 152813QE

**ON24 Adds Web Conference Platform To Its Suite Of Multimedia Communication Solutions**

Internet Wire

Thursday, October 24, 2002

JOURNAL CODE: BFFH LANGUAGE: English RECORD TYPE: Fulltext

DOCUMENT TYPE: Newswire

WORD COUNT: 339

...companies connect multiple people in multiple locations with just a phone line and a web **browser**. Additionally, it gives customers the **option** to deliver **live** or on-demand **audio** and **video** streaming, including signal acquisition, hosting and distribution. Key capabilities include:

The Web Conference Center is...

?

Search Report from Ginger D. Roberts

?show files;ds

File 9:Business & Industry(R) Jul/1994-2003/Feb 25  
(c) 2003 Resp. DB Svcs.  
File 267:Finance & Banking Newsletters 2003/Feb 24  
(c) 2003 The Dialog Corp.  
File 340:CLAIMS(R)/US Patent 1950-03/Feb 25  
(c) 2003 IFI/CLAIMS(R)  
File 349:PCT FULLTEXT 1979-2002/UB=20030220,UT=20030213  
(c) 2003 WIPO/Univentio  
File 351:Derwent WPI 1963-2003/UD,UM &UP=200313  
(c) 2003 Thomson Derwent  
File 636:Gale Group Newsletter DB(TM) 1987-2003/Feb 25  
(c) 2003 The Gale Group  
File 654:US PAT.FULL. 1976-2003/Feb 25  
(c) FORMAT ONLY 2003 THE DIALOG CORP.  
File 761:Datamonitor Market Res. 1992-2003/Feb  
(c) 2003 Datamonitor  
File 765:Frost & Sullivan 1992-1999/Apr  
(c) 1999 Frost & Sullivan Inc.  
File 993:NewsRoom 2002/Jan-Sep  
(c) 2003 The Dialog Corporation

Set	Items	Description
S1	17	LIVE(2W) (ADVISING OR ADVISOR OR BROKER OR COACH OR COUNSEL- LOR) (S) (GUI OR INTERFACE? OR BROWSER?) (S) (FINANCIAL? OR FINAN- CE? OR INVESTMENT? OR INVESTING)
S2	15	RD (unique items)

?t2/3,k/all

2/3,K/1 (Item 1 from file: 9)

DIALOG(R)File 9:Business & Industry(R)  
(c) 2003 Resp. DB Svcs. All rts. reserv.

03436389 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**Circle Trust, Ameritrade announce partnership. (Vendors)**

Defined Contribution News, v 10, n 6, p 5(1)  
March 25, 2002  
DOCUMENT TYPE: Newsletter (United Kingdom)  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 244

(USE FORMAT 7 OR 9 FOR FULLTEXT)

TEXT:

...are No Transaction Fee funds. These NTF funds would be free to trade if participant **investments** remain for an extended period of time, said Parry, who could not recall the specific...

...period. Participants will pay \$20 per trade using Ameritrade's online or interactive voice recognition **interfaces** . or they can opt to trade through a **live broker** at a cost of \$25. ...

2/3,K/2 (Item 1 from file: 267)

DIALOG(R)File 267:Finance & Banking Newsletters  
(c) 2003 The Dialog Corp. All rts. reserv.

04573042

**Quicken 401(k) Site Features Live Advisor Help**  
Jerry Minkoff  
Web Finance



Search Report from Ginger D. Roberts

November 13, 2000 DOCUMENT TYPE: NEWSLETTER  
PUBLISHER: SECURITIES DATA PUBLISHING  
LANGUAGE: ENGLISH WORD COUNT: 636 RECORD TYPE: FULLTEXT

(c) SECURITIES DATA PUBLISHING All Rts. Reserv.

TEXT:

...401k Advisor by TeamVest Web site enables 401(k) plan participants to work with an **investment** advisor over the Internet or by phone.

According to Intuit, Quicken 401k Advisor is the...

...browser screen.

Intuit Quicken 401k Advisor was developed by TeamVest, a Charlotte, N.C.-based **investment** advisory firm. David Evans, TeamVest's president, said the site incorporated features which made it...

...for 40 state government retirement plans.

Isabella Fonseca, an analyst with Celent Communications who studies **financial** planning sites, said TeamVest is unique in providing preloaded plan data and online access to...

...a number of vendors that we looked at, TeamVest was the only service to offer **live financial advisor** support. We looked at about 10 major sites," she said.

Change has come quickly to...

...Intuit Quicken 401k Advisor is to run a Monte Carlo simulation, one of the few **financial** advice sites that does so. Monte Carlo simulation calculates the likelihood of different **investment** outcomes, based on return, inflation and asset allocation. "By running hundreds of different scenarios and **financial** planners wouldn't work with such a small account. "We wanted to make this type...

...the most part, our products appeal to people who do not have access to a **financial** professional," Cherkas said.

The ability to communicate with a person is crucial in the advice...

...s service center have an average of six years' experience. All are SEC-certified registered **investment** advisors, Evans said. Once a client is assigned to an advisor, "they work with the...

2/3,K/3 (Item 1 from file: 340)  
DIALOG(R)File 340:CLAIMS(R)/US Patent  
(c) 2003 IFI/CLAIMS(R). All rts. reserv.

10151722 2002-0095363

**E/FINANCIAL PLANNING AND COUNSELING SYSTEM PROJECTING USER CASH FLOW**

Inventors: Sloan Ronald E (CA); Slutsky Stephen B (CA)

Assignee: Unassigned Or Assigned To Individual

Assignee Code: 68000

	Kind	Publication Number	Date	Application Number	Date
	A1	US 20020095363	20020718	US 2001929610	20010813
Continuation of:		PENDING		US 2000705288	20001101
Cont.-in-part of:		PENDING		US 99431668	19991101
Priority Applic:				US 2001929610	20010813
				US 2000705288	20001101
				US 99431668	19991101

Search Report from Ginger D. Roberts

Non-exemplary Claims: ...server of claim 11 further comprising at least one of an automated coaching engine and **live advising interface** to dispense advise...

**2/3,K/4 (Item 2 from file: 340)**  
 DIALOG(R) File 340:CLAIMS(R)/US Patent  
 (c) 2003 IFI/CLAIMS(R). All rts. reserv.

10147966 2002-0091607

**E/COMMUNICATION INTERFACE FOR A FINANCIAL MODELING AND COUNSELING SYSTEM**

Inventors: Sloan Ronald E (CA); Slutsky Stephen B (CA)

Assignee: Unassigned Or Assigned To Individual

Assignee Code: 68000

	Kind	Publication Number	Date	Application Number	Date
	A1	US 20020091607	20020711	US 2001929735	20010813
Continuation of:		PENDING		US 2000705290	20001101
Cont.-in-part of:		PENDING		US 99431389	19991101
		PENDING		US 99452273	19991130
		PENDING		US 2000579849	20000525
Priority Applic:				US 2001929735	20010813
				US 2000705290	20001101
				US 99431389	19991101
				US 99452273	19991130
				US 2000579849	20000525

Abstract: The present invention provides a communication medium for a **financial** modeling and counseling system between a user and **live advisor**. A user **interface** provides various communication options for the user to select from. The options include voice, talk...

...well direct access by a stand alone telephone. With most option the user and the **live advisor** have access to a collaborative medium where they can share data.

**2/3,K/5 (Item 1 from file: 349)**  
 DIALOG(R) File 349:PCT FULLTEXT  
 (c) 2003 WIPO/Univentio. All rts. reserv.

00833781 \*\*Image available\*\*

**A USER INTERFACE FOR A FINANCIAL MODELING SYSTEM**  
**INTERFACE UTILISATEUR POUR SYSTEME DE MODELE FINANCIER**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
 (Residence), US (Nationality)

Inventor(s):

SLOAN Ronald E, 228 Briar Hill Avenue, Toronto, Ontario M4R 1J2, CA,  
 SLUTSKY Stephen B, Penthouse B, 206 St. George Street, Toronto, Ontario  
 M5R 2N6, CA,

Legal Representative:

Hickman Paul L (agent), Oppenheimer Wolff & Donnelly LLP, Suite 3800,  
 2029 Century Park East, Los Angeles, CA 90067, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200167334 A2 20010913 (WO 0167334)

Application: WO 2000US41855 20001101 (PCT/WO US0041855)

Priority Application: US 99431684 19991101; US 2000579852 20000525

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES

Search Report from Ginger D. Roberts

FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD  
MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ  
VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 10370

Fulltext Availability:

Detailed Description

Claims

Detailed Description

... of the model and during the use of the model, the user may contact a **live advisor** by selecting from a variety of communication icons. The present invention also provides interactive and...

...automated coaching engine. The coaching window displays context sensitive coaching strings related to the user **financial** model and information.

3

context of a financial portfolio modeling framework. The GUI interface allows...includes a financial advisor system 102 connected through a wide area network 104 to the **live advisor** terminal 106 a user terminal 110. Preferably, the wide area network 104 is a global...a personalized web site which a client uses to collaborate with a dedicated virtual (or **live**) **financial advisor**.

As depicted, the graphical user interface can include an advisor area 216, where images of the **live advisor** may be represented as still images, streaming video, or represented by a character. Selecting a...

...call, or of any other type is acceptable as discussed in Figure 2. The communication **interface** between the user and the **financial** advisor system is further discussed in the related U.S.

application named Communication Interface for...

Claim

... icons for selecting at least one of a plurality of methods for communicating with a **live coach** ;  
providing a video window which can display an image of said **live coach** ;  
; and providing an dynamic window which can display automated coaching.

2 The method of claim...

...plurality of communication icons for selecting one of a plurality of communication methods with a **live coach** ;  
a display generator coupled to a wide area network for providing a video window which  
can display an image of said **live coach** ; and  
an automated coaching engine coupled to a wide area network for providing automated coaching...

...icons for selecting at least one of a plurality of methods for communicating with a **live coach** ;  
code segment for providing a video window which can display an image of

said **live**  
**coach** ;and  
code segment for providing an dynamic window which can display automated  
coaching.

19 The...

2/3,K/6 (Item 2 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
(c) 2003 WIPO/Univentio. All rts. reserv.

00804463

**COMMUNICATION INTERFACE FOR A FINANCIAL MODELING AND COUNSELING SYSTEM**  
**INTERFACE DE COMMUNICATION DESTINEE A UN SYSTEME DE MODELISATION ET DE**  
**CONSEIL FINANCIERS**

Patent Applicant/Assignee:  
ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):  
SLOAN Ronald E, 228 Briar Hill Avenue, Toronto, Ontario M4R 1J2, CA,  
SLUTSKY Stephen B, Penthouse B, 206 St. George Street, Toronto, Ontario  
M5R 2N6, CA,

Legal Representative:  
COLEMAN Brian R (agent), Oppenheimer Wolff & Donnelly LLP, 1400 Page Mill  
Road, Palo Alto, CA 94304, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200137187 A2 20010525 (WO 0137187)  
Application: WO 2000US41850 20001101 (PCT/WO US0041850)  
Priority Application: US 99431389 19991101; US 99452273 19991130; US  
2000579849 20000525

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES  
FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD  
MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ  
VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English  
Filing Language: English  
Fulltext Word Count: 10857

Fulltext Availability:  
Detailed Description  
Claims

Detailed Description  
... interactions between a client and server; Figure 8 is a representation  
an implementation of a **live advisor** (Customer Support  
Representative's (CSR)) connection to a communication system;  
Figure 9 represents a logical...

...Figure I I shows a representative navigational relationship between the  
various web pages of a  
**financial** modeling and counseling system;

4  
Figure 12 is an illustration of a LifePath model web page **interface** ;  
Figure 13 is another illustration of a LifePath model web page **interface**  
; and Figure 14 is an illustration of an **Investment** Portfolio generator  
web page **interface** ;

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENTS

Figure 1 is an illustration of one embodiment of a **financial** management information system, in accordance with the present invention, for providing personalized **financial** advice in a collaborative computing environment. In figure 1, **financial** management system 100 includes a **financial** advisor system 102 connected through a wide area network 104 to the **live** **advisor** terminal 106 a user terminal 110. Preferably, the wide area network 104 is a global...are interpreted by the user's browser.

17

Figure 8 represents the implementation of the **live** **advisor** or a Customer Support Representative's (CSR) 106 connection to the communication system. In one implementation of the present invention, the user can contact a **live** **advisor** using a stand alone telephone such a land telephone or a cellular telephone 124. When the user calls the **financial** modeling and counseling system, his call is first received by the Interactive Voice Response server 120, which (ACD) server 122 to the appropriate **live** **advisor** 106. The Customer Service Representative or the **live** **advisor** 's computer 106 operates a personal computer operating software such as windows 95<sup>TM</sup>

I . Furthermore, the **live** **advisor** 's computer 106 is running a standard web **browser** such as the Internet Explorer 4.0<sup>TM</sup> 182. Both these software are off the shelf software packages available from MicroSoft<sup>TM</sup> Corporation. The **live** **advisor** 's **browser** can download and interpret HTML pages generated by the Active Server Pages 254. The ACD server 122 communicates with server side scripts (ASP) which routes the call request to the **live** **advisor** 's computer 106 through the network 104 and through the customer support representative's web...

...a remote sever. Call management software such as CosmoCall Agent Software 258 operates on the **live** **advisor** 's computer 106, and initiates and manages the call until a change of status message...a personalized web site which a client uses to collaborate with a dedicated virtual (or **live** ) **financial** **advisor** . As depicted, the graphical user **interface** can include an advisor area 306, where images of the **live** **advisor** may be represented as still images. as streaming video, or represented by a character. Selecting...

Claim

... page  
envirom-nent; and  
code segment enabling a communication medium between said user and a **live** **advisor** based on the user selected cominication option whereby said **live** **advisor** may provide live **financial** coaching.

18 The computer program embodied on a computer readable medium of claim 17 further...between said user and said live advisor upon the selection of a communication option.

36

**Financial** **Advisor**  
System  
104  
e Area  
Network  
a era Camera  
108-A 08-B  
109-B...

...122  
ton

Search Report from Ginger D. Roberts

117  
It  
WAN  
Mail  
Samar  
126

-----  
-----

113  
112 116  
114  
Figure 2  
START  
**FINANCIAL** 130  
COUNSELING  
IF  
PR IDE 132  
AUTO ATED  
COACHING  
134  
Hi ?  
136  
Yes PROVIDE ONE...

...144 1148 164  
140  
@-1 - ADAPTER - ADAPT  
Co UNIC  
Fcpu FRAMI  
JA\$  
166  
152  
154  
**INTERFACE**  
I  
160 156 8 162  
Figure 4  
10 182  
192 128  
124- 86  
Coll center...

...1a  
190 202  
A 94  
187 114 170  
Figure 5  
182 186 126. Client .....  
..... Sewer. ....  
**Browser** 24 : :  
Windows NT Serve  
210 IE 4.0  
250  
HTML IISWebServer/ 252  
220. Coaching Dialog...

2/3,K/7 (Item 3 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
(c) 2003 WIPO/Univentio. All rts. reserv.

00800768

February 26, 2003 7 10:04

**A FINANCIAL PLANNING AND COUNSELING SYSTEM PROJECTING USER CASH FLOW  
PROJECTION EN MATIERE DE SYSTEME DE CONSEILS ET DE PLANIFICATION FINANCIERS**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

SLOAN Ronald E, 228 Briar Hill Avenue, Toronto, Ontario M4R 1J2, CA,  
SLUTSKY Stephen B, Penthouse B, 206 St. George Street, Toronto, Ontario  
M5R 2N6, CA,

Legal Representative:

COLEMAN Brian R (agent), Oppenheimer Wolff & Donnelly LLP, 1400 Page Mill  
Road, Palo Alto, CA 94304, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200133476 A2 20010510 (WO 0133476)

Application: WO 2000US41872 20001101 (PCT/WO US0041872)

Priority Application: US 99431668 19991101; US 2000580273 20000525

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CU CZ DE

DK DM DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR

LS LT LU LV MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL TJ

TM TR TT TZ UA UG UZ VN YU ZA ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 11436

Fulltext Availability:

Detailed Description

Claims

Detailed Description

... a personalized web site which a client uses to collaborate with a  
dedicated virtual (or **live**) **financial advisor**. As depicted, the  
graphical user **interface** can include an advisor area 600, where the  
advisor may be represented as a still...

Claim

... of claim I I further comprising at least one of an automated coaching  
engine and **live advising interface** to dispense advise.

17 The financial model of claim I I wherein the access to...

2/3,K/8 (Item 4 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00800763

**FINANCIAL MODELING AND COUNSELING SYSTEM**

**SYSTEME DE MODELISATION ET DE CONSEILS FINANCIERS**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

SLOAN Ronald E, 228 Briar Hill Avenue, Toronto, Ontario M4R 1J2, CA,  
SLUTSKY Stephen B, Penthouse B, 206 St. George Street, Toronto, Ontario  
M5R 2N6, CA,

Legal Representative:

HICKMAN Paul (et al) (agent), Oppenheimer Wolff & Donnelly LLP, 2029  
Century Park East, Suite 3800, Los Angeles, CA 90067-3024, US,

Search Report from Ginger D. Roberts

Patent and Priority Information (Country, Number, Date):

Patent: WO 200133467 A2 20010510 (WO 0133467)  
Application: WO 2000US30389 20001101 (PCT/WO US0030389)  
Priority Application: US 99431389 19991101; US 2000580276 20000525

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CR CU CZ

DE DK DM DZ EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP KR KZ  
LC LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG

SI SK SL TJ TM TR TT TZ UA UG UZ VN YU ZA ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 13610

Fulltext Availability:

Detailed Description

Detailed Description

... rebalance a portfolio; and

Figure 17 is a flow diagram of an automated coaching and **live advisor** subsystems in accordance with a preferred embodiment.

7

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENTS

Figure...web

2 1

site that a client uses to collaborate with a dedicated virtual (or **live**) **financial advisor**. As depicted, the graphical user **interface** can include an advisor area 216, where images of the **live advisor** may be represented as a still images, as streaming video, or represented by a character...

2/3,K/9 (Item 5 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00800759

**FINANCIAL PORTFOLIO RISK MANAGEMENT**

**GESTION DES RISQUES DES PORTEFEUILLES FINANCIERS**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US

(Residence), US (Nationality)

Inventor(s):

SLOAN Ronald E, 228 Briar Hill Avenue, Toronto, Ontario M4R 1J2, CA,

SLUTSKY Stephen B, Penthouse B, 206 St. George Street, Toronto, Ontario  
M5R 2N6, CA,

Legal Representative:

COLEMAN Brian R (agent), Oppenheimer Wolff & Donnelly LLP, 1400 Page Mill Road, Palo Alto, CA 94304, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200133402 A2 20010510 (WO 0133402)

Application: WO 2000US30423 20001101 (PCT/WO US0030423)

Priority Application: US 99431390 19991101; US 2000520580 20000525

Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES

FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD  
MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ

VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG



Search Report from Ginger D. Roberts

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
(EA) AM AZ BY KG KZ MD RU TJ TM  
Publication Language: English  
Filing Language: English  
Fulltext Word Count: 15078

Fulltext Availability:  
Detailed Description

Detailed Description

... Preferably, the user terminal 110 is

8

the user, across the network 104 to the **live advisor** at the advisor terminal 106.

Access to the live financial advisor 106 and all other...same day as the present invention and herein incorporated by reference. The automated coaching and **live advising** systems are further described in the related patents titled **Financial Modeling and Counseling System**, attorney docket number AND1P755 and Automated Coaching for a **Financial Modeling and Counseling System**, attorney docket number AND I P760, and A User **Interface For a Financial Modeling System**, attorney docket number AND1P759, all by the same inventors as the present invention...

2/3,K/10 (Item 1 from file: 351)

DIALOG(R)File 351:Derwent WPI

(c) 2003 Thomson Derwent. All rts. reserv.

014073703

WPI Acc No: 2001-557916/200162

XRPX Acc No: N01-414580

**Graphical user interface for a financial modeling system has icons for selecting live or automated coaching and video and dynamic windows for displaying live and automated coaches**

Patent Assignee: ACCENTURE LLP (ACCE-N)

Inventor: SLOAN R E; SLUTSKY S B

Number of Countries: 084 Number of Patents: 003

Patent Family:

Patent No	Kind	Date	Applicat No	Kind	Date	Week
WO 200167334	A2	20010913	WO 2000US41855	A	20001101	200162 B
AU 200136416	A	20010917	AU 200136416	A	20001101	200204
EP 1228473	A1	20020807	EP 2000991933	A	20001101	200259
			WO 2000US41855	A	20001101	

Priority Applications (No Type Date): US 2000579852 A 20000525; US 99431684 A 19991101

Patent Details:

Patent No Kind Lan Pg Main IPC Filing Notes

WO 200167334 A2 E 50 G06F-017/60

Designated States (National): AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ VN YU ZW

Designated States (Regional): AT BE CH CY DE DK EA ES FI FR GB GH GM GR IE IT KE LS LU MC MW MZ NL OA PT SD SE SL SZ TR TZ UG ZW

AU 200136416 A G06F-017/60 Based on patent WO 200167334

EP 1228473 A1 E G06F-017/60 Based on patent WO 200167334

Designated States (Regional): AL AT BE CH CY DE DK ES FI FR GB GR IE IT LI LT LU LV MC MK NL PT RO SE SI TR

Abstract (Basic):

February 26, 2003 10 10:04

Search Report from Ginger D. Roberts

... The **financial** modeling system operates in a collaborative computing environment between a user and a **financial** advisor. The model has a user intention modeling module and an **investment** planning module. The user **interface** allows the user to select a **live coach** or an automated coaching system with the aim of meeting the user's stated intentions. Communications between the **live coach** and the user may be by e-mail, electronic chat, live streamed audio, voice over the network, telephone, still picture, streamed live video or a collaborative interaction page. A **financial** model may be displayed to the user together with functional icons allowing the user to...

2/3,K/11 (Item 1 from file: 654)  
DIALOG(R)File 654:US PAT.FULL.  
(c) FORMAT ONLY 2003 THE DIALOG CORP. All rts. reserv.

4722260 \*\*IMAGE Available  
Derwent Accession: 2002-758699

**Utility**

**E/ Method and system for providing multiple entry points to a vehicle navigation route**

Inventor: Stefan, Jeffrey M., Clawson, MI  
Means, Linda G., Macomb Township, MI  
Stewart, Gregory B., Livonia, MI  
Assignee: General Motors Corporation (02), Detroit, MI  
General Motors Corp (Code: 33984)  
Examiner: Camby, Richard M. (Art Unit: 361)  
Combined Principal Attorneys: Simon, Anthony Luke

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6427119	A	20020730	US 2001835531	20010416
Priority				US 2001835531	20010416

Fulltext Word Count: 7929

Description of the Invention:

...subscriber management application 240. System 200 may also allow the subscriber to connect to a **live** administrator or **advisor** 270 through a spoken command acknowledged through the subscriber management application 240 voice user **interface** (VUI...

...VUI access 222 through a PSTN 220. This may serve as the primary end user **interface** to service management application 240. This VUI access may allow subscribers in their vehicles equippedSubscriber 210 may also have graphical user **interface** ( **GUI** ) access 232 through a communication network 230, such as the Internet. Such an **interface** may allow subscribers to access a variety of Internet and communication network-based services in accordance with the present invention. For example, subscriber 210 may access email via this **interface** . In one embodiment of the invention, subscribers connect to the service management application 240 through the Internet 230 using standard Web **browsers** .

...

...Subscriber 210 may also have **GUI** access through a web channel 260. This **interface** may be used by subscribers to access a variety of services. For example, subscriber 210...  
...also set up user-related rules such as e-mail consolidation and filtering rules. This **interface** may also be used to access selected content services. Vehicle data, such as diagnostic codes...

Search Report from Ginger D. Roberts

...subsystem 240. The subscribers 210 may connect to the web channel 260 using standard Web **browsers**. In one embodiment of the invention, standard web channel software interacts with the service management one embodiment of the invention, the web channel 260 **interface** uses a dedicated connection to the service management system 240...

...System 200 may also include one or more administrators 270. Administrator 270 may use **GUI** access to manage service management system 240 and information related to system 200. Administrator 270 may be, for example, a **live advisor** available to advise subscriber 210. Administrator 270 may also be, for example, an individual maintaining... and store audio news and sports stories for playback to interested subscribers 210. The primary **interface** between the speech channel and news content provider 236 may be via the Internet 230...System 200 may also include one or more **finance** services 238. For example, stock quotes may be provided to the subscriber. Any suitable **finance** technology may be used to provide these services to interested subscribers. In the embodiment of FIG. 2, the **finance** information is obtained at the time of the request through Internet attached content sources or...

...may also include other services to be delivered in addition to news, weather, sports and **finance** services as described above. For example, yellow pages listings, special interest content (e.g., movie...service management subsystem 40 may communicate with vehicle client 310, 312 via a VUI or **GUI**.

2/3,K/12 (Item 2 from file: 654)

DIALOG(R)File 654:US PAT.FULL.

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4719854 \*\*IMAGE Available  
Derwent Accession: 2002-654795

**Utility**

E/ **Method for providing vehicle navigation instructions**

Inventor: Correia, John J., Livonia, MI  
Stefan, Jeffrey M., Clawson, MI  
Jijina, Jasmin, Novi, MI

Assignee: General Motors Corporation (02), Detroit, MI  
General Motors Corp (Code: 33984)

Examiner: Camby, Richard M. (Art Unit: 361)

Combined Principal Attorneys: Simon, Anthony Luke

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6424912	A	20020723	US 200137025	20011109
Priority				US 200137025	20011109

Fulltext Word Count: 4513

Description of the Invention:

...subscriber management application 240. System 200 may also allow the subscriber to connect to a **live** administrator or **advisor** 270 through a spoken command acknowledged through the subscriber management application 240 voice user **interface** (VUI...

...VUI access 222 through a PSTN 220. This may serve as the primary end user **interface** to service management application 240. This VUI access

February 26, 2003 12 10:04

Search Report from Ginger D. Roberts

may allow subscribers in their vehicles equippedSubscriber 210 may also have graphical user **interface** ( **GUI** ) access 232 through a communication network 230, such as the Internet. Such an **interface** may allow subscribers to access a variety of Internet and communication network-based services in accordance with the present invention. For example, subscriber 210 may access email via this **interface** . In one embodiment of the invention, subscribers connect to the service management application 240 through the Internet 230 using standard Web **browsers** .

...Subscriber 210 may also have **GUI** access through a web channel 260. This **interface** may be used by subscribers to access a variety of services. For example, subscriber 210...

...also set up user-related rules such as e-mail consolidation and filtering rules. This **interface** may also be used to access selected content services. Vehicle data, such as diagnostic codes...

...subsystem 240. The subscribers 210 may connect to the web channel 260 using standard Web **browsers** . In one embodiment of the invention, standard web channel software interacts with the service management interest. In one embodiment of the invention, the web channel 260 **interface** uses a dedicated connection to the service management system 240...

...System 200 may also include one or more administrators 270. Administrator 270 may use **GUI** access to manage service management system 240 and information related to system 200. Administrator 270 may be, for example, a **live advisor** available to advise subscriber 210. Administrator 270 may also be, for example, an individual maintaining... and store audio news and sports stories for playback to interested subscribers 210. The primary **interface** between the speech channel and news content provider 236 may be via the Internet 230...System 200 may also include one or more **finance** services 238. For example, stock quotes may be provided to the subscriber. Any suitable **finance** technology may be used to provide these services to interested subscribers. In the embodiment of FIG. 2, the **finance** information is obtained at the time of the request through Internet attached content sources or...

...may also include other services to be delivered in addition to news, weather, sports and **finance** services as described above. For example, yellow pages listings, special interest content (e.g., movie...

2/3,K/13 (Item 3 from file: 654)  
DIALOG(R)File 654:US PAT.FULL.  
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4601416 \*\*IMAGE Available  
Derwent Accession: 2002-009783

Utility  
REASSIGNED

E/ **Securities and commodities trading system**  
Inventor: Kane, Richard L., 5030 Champion Blvd., Suite 6-183, Boca Raton,  
FL, 33496

Assignee: Unassigned  
Unassigned Or Assigned To Individual (Code: 68000)

Examiner: Millin, Vincent (Art Unit: 215)

Assistant Examiner: Kazimi, Hani M.

Law Firm: Oltman, Flynn & Kubler

February 26, 2003 13 10:04

# Search Report from Ginger D. Roberts

	Publication Number	Kind	Date	Application Number	Filing Date
Main Patent	US 6317728	A	20011113	US 98170745	19981013
Priority				US 98170745	19981013

Fulltext Word Count: 10387

Description of the Invention:

...the kind of careful, tireless monitoring required, giving the user a daily return on his **investment** while minimizing risk...system supports SSL secure sockets and other internet protocols to mimic the function of a **browser** accessing an electronic trading site while placing orders, checking the status of orders, and checking...

...This enables the automated management of accounts held by specialists. The modular nature of this **interface** for securities trading is unique ...trading, the system simulates order completions as if the orders were being filled with a **live broker**. This enables the learning process against historical data, and allows trading against a live feed...

2/3,K/14 (Item 1 from file: 761)  
DIALOG(R)File 761:Datamonitor Market Res.  
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00143256

## EBANKING TECHNOLOGY MARKETPLACE: 1.1 CONSUMER PURCHASE INHIBITORS

Main Title: SIEBEL COMPANY PROFILE  
Pub. Date: October 15, 2001  
Source: DATAMONITOR  
Telephone: +44 20 7675 7000  
Word Count: 1130 (1 pp.)  
Language: English

Country: WORLD  
Industry: BANKING AND FINANCE  
Company Names (DIALOG Generated): Citibank ; Customer ; Netbank ;  
Progressive

...another, and can be read and understood online with little or no help from a **live broker** or agent. In contrast, Life and Health insurance policies are more difficult to understand. With...

...this by making it increasingly more convenient to purchase insurance online by aligning with other **financial** institution for a one-stop-shop effect. This will be discussed further within 'Consumer purchase...

...certain cost savings in eliminating much of the overhead associated with a physical branch and **live insurance broker**. The consumer expects much of these savings to be passed down to them. This has...

...strong factor in bringing insurance customers online. This is rapidly changing. With the convergence of **financial** services institutions, there are increasingly one stop shops for consumers from which they can purchase many or all **financial** services products. Institutions such as Citibank offer banking, brokerage and insurance products and services from the convenience of one site. Other net only vendors are aligning with **financial** services firms offering links to one another's sites, such as the alliance of insurance...

...are offering online portfolio management. The aim is for the consumer to consolidate their entire **financial** services portfolio for self directed management on one web site. Consumers are able to take a holistic approach to their portfolios, assessing how all of their individual **financial** products fit into their portfolio vision and goals. Many of these sites illustrate how insurance is an important part of one's **financial** planning.

Another convenient aspect of online insurance strategies can be found through the multi channel strategy approach taken by many **financial** services institutions including citibank, Chase and Progressive. With this approach, the consumer is able to use the **interface** that

2/3,K/15 (Item 1 from file: 765)  
DIALOG(R)File 765:Frost & Sullivan  
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00354997

**FORECASTS OF THE U.S. CONSUMER INTERACTIVE TELEVISION TRANSACTION SERVICES MARKET:** Forecast of the Interactive Television Registration Transaction Services Market: Market and Technology Trends: End-User Applications: Filing of Complex Data Forms; Taking Examinations or Studying for Tests

Main Title: U.S. CONSUMER MARKETS FOR INTERACTIVE TELEVISION:SERVICES AND ADVERTISING

Pub. Date: May 1996

Source: Frost & Sullivan

Telephone: US (415) 961 - 1000; London 071 730 3438

Word Count: 400 (1 pp.)

Language: English

Country: UNITED STATES

Industry: TELECOMMUNICATIONS

Company Names (DIALOG Generated): Complex Data Forms ; Internal Revenue Service

Filing of Complex Data Forms

The preceding applications will rely on simple graphical **interfaces** to accomplish their goals. However, there will likely be a need to handle more complex...

...into the form instead of typing on a keyboard. The ability to link with a **live financial advisor** or an Internal Revenue Service representative for advice would be another benefit.

A large television...

?